

TAB #22

**EMPLOYEE EVALUATION PROCESS &
FORMS**

LSSCM EVALUATION GUIDELINES

This memo outlines LSSCM's policy towards evaluations.

The staff evaluation process is intended to: engage staff in an evaluation of their work; foster a discussion of how the employee's work relates to office work goals and program work goals; and give staff direct feedback on how their work is perceived by management. The process is intended to encourage staff participation—through pre-evaluation questionnaires, open discussion in the evaluation meetings, and the invitation to employee responses to the evaluation.

In general, staff evaluations should cover:

The volume and quality of the employee's work—both direct service work and impact work

The employee's compliance with program administrative policies

The employee's work-related relationships with management, other staff, clients, etc.

How the employee's work relates to office and program goals

The employee's need for support and/or training

Evaluations should be performed annually. Evaluations should rely on data—e.g., pika case records, timesheets. Peer evaluation materials are permitted but not required. Evaluations should be conducted in a confidential setting and on a one-to-one basis. Evaluations should include both a discussion and a written component. Written evaluations should be in a narrative format (as opposed to a form evaluation). The memo summarizing the evaluation does not need to be lengthy or cover every item discussed in the evaluation meeting. Whenever possible, each evaluation should include a workplan, which sets out the expected time distribution for the employee and specific goals for the employee (individual and office goals) in the upcoming year.

Staff have the opportunity to respond to the evaluations verbally or in writing. Any written response to the evaluation submitted by the staff person (including any self-evaluation or management/supervision evaluation) shall be retained in the file along with the evaluation.

Any evaluation of management personnel prepared by an employee or a resigning employee shall be placed in the file of the management employee. The management employee has the right to respond to the review or to object to the inclusion of the review in his or her file.

The general process for evaluations shall be as follows:

- (a) Pre-evaluation document completed by staff.
- (b) Discussion meeting between staff and supervisor.
- (c) Draft Goals or Workplan and the written evaluation by supervisor.
- (d) Response, self-evaluation, and/or management/supervision evaluation, at the option of the employee.
- (e) Any written response by staff shall be submitted prior to or within twenty-one (21) days after the date of the evaluation.

Entries in employee files relating to evaluations and discipline are confidential documents and should not be released (except to LSSCM program managers) without the prior written consent of the employee.

8/05

PRE-EVALUATION WORKSHEET

LEGAL ASSISTANT/RECEPTIONIST QUESTIONNAIRE

1. Please describe your current assignments (e.g., who do you type for?; do you have receptionist duties?; do you have report-writing or supply ordering duties?; etc.). Please estimate what percentage of your time is spent on each major category of your work. Overall, do you feel that your workload is too great for your time, about right for your time, or that you have time available at work?
2. What are the three most important matters that you have worked on over the past six months?
3. What are the three most time consuming matters that you have worked on over the past six months?
4. Are there any special projects that you are currently working on or have recently completed? If so, please describe?
5. How would you describe your strengths and weaknesses?

6. What are your areas of satisfaction and dissatisfaction with your job?

7. Do you feel that your time and talents are being fully utilized in your job? If not, please explain why not. If not, do you have any suggestions on how your time and talents could be more fully utilized?

8. In addition to thinking about your job, do you have any suggestions about how the office could work better or function more efficiently?

9. What do you see as your training needs for the upcoming year?

**PRE-EVALUATION WORKSHEET
ATTORNEY QUESTIONNAIRE**

(To be completed one week prior to the evaluation conference)

1. How many open cases are you currently handling?
What substantive areas are these cases in?

2. How many cases are being supervised by you but are actually being handled by another person?

3. How many cases are in litigation?
What substantive areas are these cases in?

4. What is the average number of cases closed by you per month (other than advice and referral cases)?

5. Give a brief description of three (3) recent cases that you closed.

6. Give a brief description of the three (3) most important matters you worked on during the past six (6) months.

7. Give a description of the three (3) most time-consuming matters you worked on during the past six (6) months.
8. List all pending federal court cases, cases in appellate courts, state court class actions, legislative advocacy projects, or other significant cases or projects. Note whether there are other attorneys of record and who has primary responsibility for the case.
9. What community groups have you worked with and what work have you performed for the group during the last six (6) months?
10. How would you describe your weaknesses and your strengths?

11. What are the areas of satisfaction and dissatisfaction concerning your position?

12. Do you feel that your time and your talents are being fully utilized in your job? If not, please explain why. If not, do you have any suggestions on how your time and talents could be better utilized?

13. Set out the goals you wish to achieve during the coming six (6) months, considering your strengths and weaknesses.

(a) What blend of routine cases, significant litigation and representation of community groups is desirable and practical?

- (b) What technical skills need improvement (interviewing, pleadings, discovery, negotiations, trial techniques, file maintenance, etc.)

14. What do you see as your training needs for the upcoming year?